

- 2 -

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characterized in that the system, in response to input and configuration, analyzes the data and presents a result via the output mechanism.

24. The system of claim 23 implemented on a network-connected server.
25. The system of claim 24, wherein the network is the Internet network.
26. The system of claim 24, wherein access to the Internet is through an Internet appliance.
27. The system of claim 26 wherein the Internet appliance is one of a personal computer, a cellular telephone, or a personal digital assistant.
28. The system of claim 23, wherein the input mechanism comprises a pre-configured electronic form.
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29. The system of claim 28, wherein the electronic form is substantially pre-filled by the system with data available to the system.
30. The system of claim 26, wherein the output mechanism comprises a display of one or more of text results, table results, and graphic results.
31. The system of claim 23, wherein a configured specific analysis includes options for output.
32. The system of claim 23, wherein the results are presented as advice to the person or representative for proceeding on a course of action which may affect one or more than one financial accounts held by the user.

- 3 -

33. A financial planning method responsive to a specific person or organization, comprising the steps of:

- (a) accessing a network-based planning system;
- (b) configuring an analysis through an input mechanism of the service;
- (c) accessing financial data specific to the person or organization by the service from data repositories accessible by the system;
- (d) performing an analysis of the data by the service, through coded routines, according to the configuration in step (b); and
- (e) providing results of the analysis by the system to the person or representative through an output mechanism.

34. The method of claim 33 wherein the network is the Internet, wherein the specific person or organization accesses the system through the Internet.

35. The method of claim 34, wherein the data repositories are file servers maintained on the Internet network.

36. The method of claim 34, wherein access to the Internet is through an Internet appliance.

37. The method of claim 36 wherein the Internet appliance is one of a personal computer, a cellular telephone, or a personal digital assistant.

38. The method of claim 33, wherein the input mechanism comprises a pre-configured electronic form.

39. The method of claim 38, wherein the electronic form is substantially pre-filled by the system with data available to the system.

- 4 -

40. The method of claim 36, wherein the output mechanism comprises a display of one or more of text results, table results, and graphic results.

41. The system of claim 33, wherein a configured specific analysis includes options for output.

42. The system of claim 33, wherein the results are presented as advice to the person or representative for proceeding on a course of action which may affect one or more than one financial accounts held by the user.
